EUROPEAN INDUSTRY DIRECTIONS AND FORECASTS

PETER LINES
Principal Consultant
INPUT

INPUT

NOTES:

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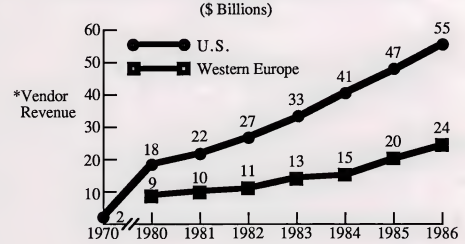
REVENUE GROWTH IN THE INFORMATION SERVICES INDUSTRY, 1970-1986



*Note: Definition changes have slightly affected gross market sizes on a year-to-year basis.

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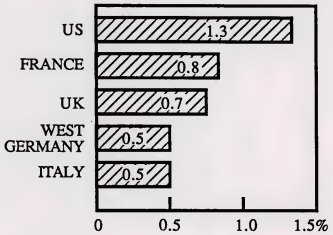
INFORMATION SERVICES MARKETS
% OF GDP



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LEADING EUROPEAN VENDORS
INFORMATION SERVICES

	$ Millions 1986
CAP GEMINI SOGETI	423
SCICON	254
CISI	219
SEMA-METRA	204
GSI	190
DATEV	187
THORN-EMI	150

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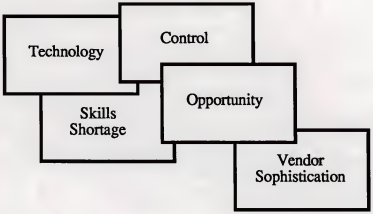
EUROPEAN MARKET DYNAMICS



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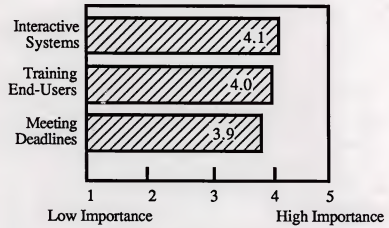
KEY USER ISSUES



USER RATING

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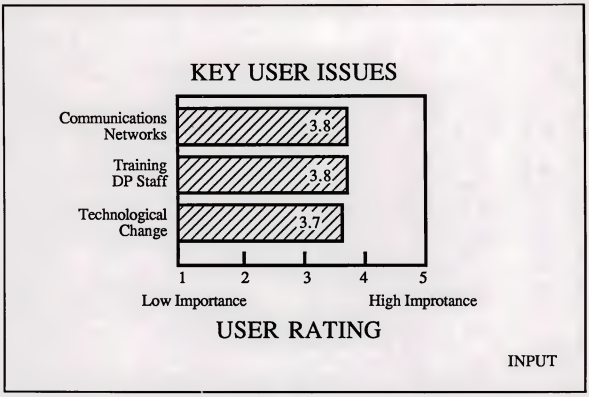

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FORECAST PARAMETERS

	(Percent)
• Inflation Assumptions	
- West Germany	+0.2
- France	+3.5
- United Kingdom	+4.1
- Italy	+4.2
• Current Dollars	

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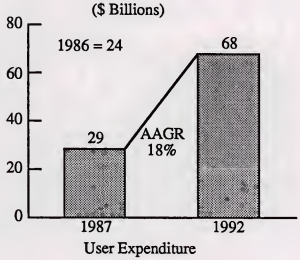
INFORMATION SERVICES MARKET - EUROPE



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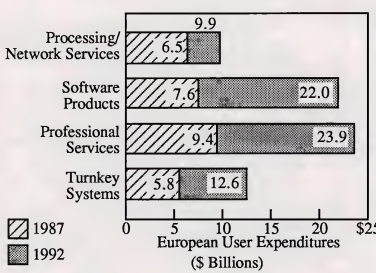
INFORMATION SERVICES INDUSTRY BY DELIVERY MODE



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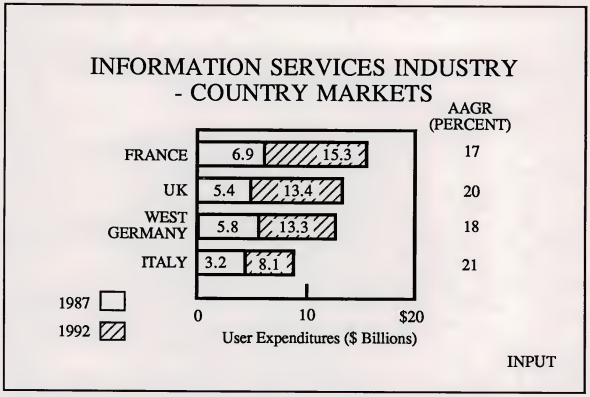

NOTES:

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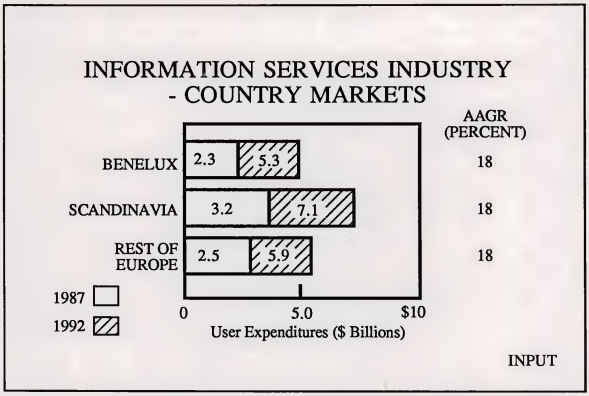

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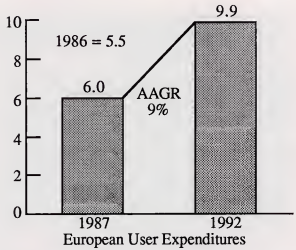
PROCESSING/NETWORK SERVICES MARKET
($ Billions)



European User Expenditures

INPUT

NOTES:

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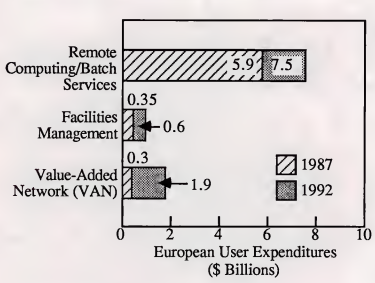
PROCESSING/NETWORK SERVICES MARKETS
1987-1992



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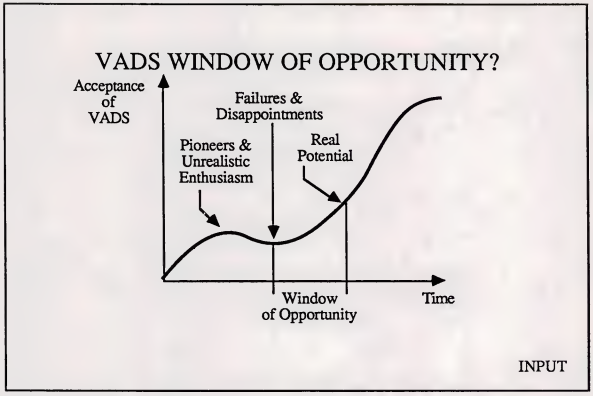

NOTES:

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EUROPEAN MARKET STRUCTURE

- US Multinationals
- Strategic Alliances
- PTTs
- Country Market Vendors
- Application Specific Vendors

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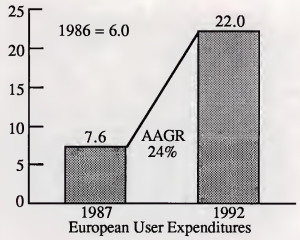
SOFTWARE PRODUCTS MARKET
($Billions)



European User Expenditures

INPUT

NOTES:

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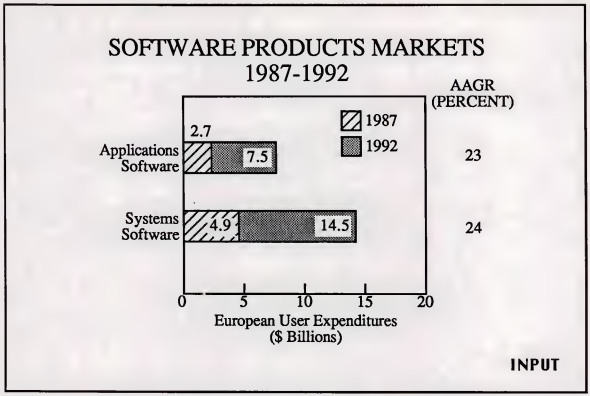

NOTES:

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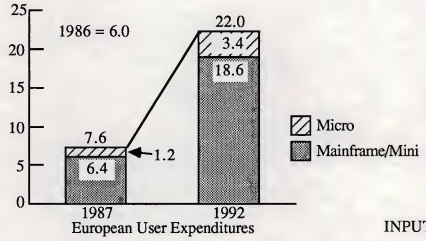
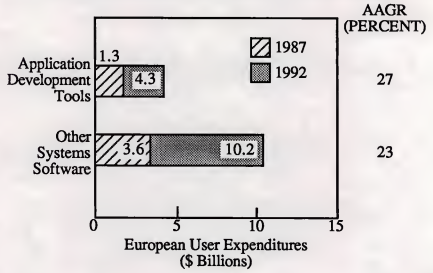
SOFTWARE PRODUCTS MARKET FORECAST, MAINFRAME/MINI AND MICRO: 1987-1992 ($ Billions)



INPUT

NOTES:

TOTAL SYSTEMS SOFTWARE MARKET BY SOFTWARE TYPE, 1987-1992



INPUT

NOTES:

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LARGEST EUROPEAN SOFTWARE PRODUCTS VENDORS

- 1. SCICON
- 2. Thorn-EMI
- 3. MBP
- 4. Software AG
- 5. CGI

INPUT

NOTES:

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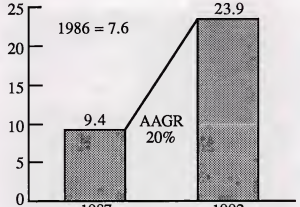
PROFESSIONAL SERVICES MARKET
($ Billions)



European User Expenditures

INPUT

NOTES:

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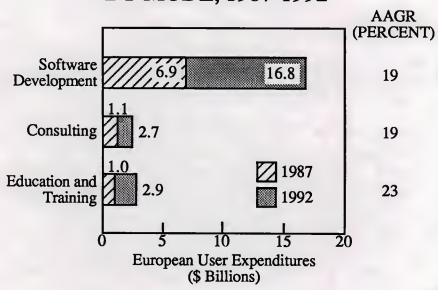
PROFESSIONAL SERVICES MARKET BY MODE, 1987-1992



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NOTES:

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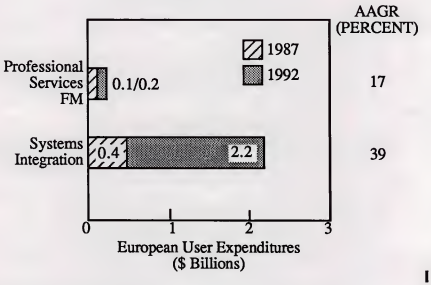
PROFESSIONAL SERVICES MARKET BY MODE, 1987-1992



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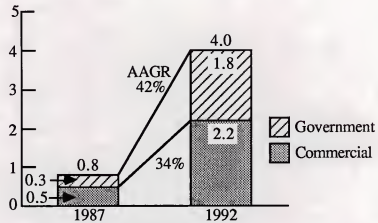
SYSTEM INTEGRATION MARKET, 1987-1992
($ Billions)



European User Expenditures

INPUT

NOTES:

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EUROPEAN SI MARKET CHARACTERISTICS

- Emergent Stage
- User Awareness
  - Technical
  - Commercial
- Joint Ventures

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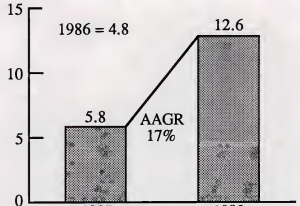
NOTES:

STANDARD TURNKEY SYSTEMS MARKET, 1987-1992 ($ Billions)



European User Expenditures

INPUT

NOTES:

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LARGEST STANDARD TURNKEY SYSTEMS VENDORS

EUROPEAN MARKET

1. Computervision
2. Intergraph
3. Applicon
4. Calma
5. Racal-Redac
6. SESA
7. Sligos
8. Metier

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CONCLUSIONS

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VENDOR SELECTION CRITERIA

- Applications Knowledge
- Technical Merit
- Performance Guarantee
- Staff Qualifications

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KEY MANAGEMENT CHALLENGES

- People Management
- Effective Control
- Technology
- User Requirements

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NOTES: